

Robert & Pamela Walters

**Proof of Income
Filed pursuant to rule 1007-4**

Case No. 20-21449

Your New Benefit Amount

BENEFICIARY'S NAME: ROBERT L WALTERS

Your Social Security benefits will increase by 2.8% in 2019 because of a rise in the cost of living. You can use this letter as proof of your benefit amount if you need to apply for food rent, or energy assistance. You can also use it to apply for bank loans or for other business. Keep this letter with your important financial records.

How Much Will I Get And When?

- Your monthly amount (before deductions) is \$1,257.1
- The amount we deduct for Medicare Medical Insurance is \$135.1
(If you did not have Medicare as of November 16, 2018,
or if someone else pays your premium, we show \$0.00.)
- The amount we deduct for your Medicare Prescription Drug Plan is \$0.0
(We will notify you if the amount changes in 2019. If you did not elect
withholding as of November 1, 2018, we show \$0.00.)
- The amount we deduct for voluntary Federal tax withholding is \$0.0
(If you did not elect voluntary tax withholding as of
November 16, 2018, we show \$0.00.)
- After we take any other deductions, you will receive \$1,122.0
on or about January 9, 2019.

If you disagree with any of these amounts, you must write to us within 60 days from the date you receive this letter. Or visit www.ssa.gov/non-medicalappeal to appeal online. We would be happy to review the amounts.

If you receive a paper check and want to switch to an electronic payment, please visit the Department of the Treasury's Go Direct website at www.godirect.org online.

What If I Have Questions?

- Visit our website at www.socialsecurity.gov
- Call us toll-free at 1-800-772-1213 (TTY 1-800-325-0778)

SERS Defined Benefit Plan Annuitant Information

Name ROBERT L WALTERS

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Social Security Number [REDACTED] 8632

Annuity Began 07-09-2010

Date of Birth [REDACTED]

Selected Pension Payment Option

Disability Option 3 - Provides you with a monthly payment for as long as you are approved by SERS to receive a disability retirement benefit. Following your death, your designated survivor will receive a lifetime monthly payment of approximately one-half of the non-disability portion of the payment you had been receiving.

You cannot change this option selection or your designated survivor unless your survivor dies, or you get married or divorced. Contact your SERS retirement counselor at 1.800.633.5461 for more information.

The full terms of your retirement benefit are set forth in the Application for Annuity filed with SERS when you retired.

Tax Information

Each year the IRS issues new income tax tables listing the amount of tax owed based on an individual's taxable income and filing status.

You may change the amount of money SERS withholds from your pension for federal income tax or choose not to have money withheld by submitting a completed *Annuitant Federal Income Tax Withholding (SERS-W4-P)* form or a *Withholding Certificate for Pension or Annuity Payments (IRS W-4P)*.

The W4-P form you currently have on file with SERS lists the following income tax filing status and withholding instructions:

Filing Status
Married

Allowances
2

Additional Amount
\$0.00

Fixed Amount
\$0.00

Withholding and Deductions

This table lists the amounts withheld from your pension payments for income tax and deducted for health insurance or other reasons. The 2020 amounts are projected based on the 2020 IRS tax tables and your current instruction listed above.

	2019 Annual Amount	2019 Monthly Amount	2020 Monthly Amount
Gross Pension Payment	\$15,028.44	\$1,252.37	\$1,252.37
Less Withholding and Deductions			
Federal Income Tax Withholdings	\$0.00	\$0.00	\$0.00
Health Insurance Premiums	\$563.88	\$46.99	\$46.99
Other Authorized Amounts	\$0.00	\$0.00	\$0.00
Net Pension Payment	\$14,464.56	\$1,205.38	\$1,205.38

FACTS ABOUT YOUR 2019 SOCIAL SECURITY BENEFIT STATEMENT

Your 2019 Social Security Benefit Statement is on the back of this form. Use it, along with the information below, to see if part of your Social Security benefits may be taxable.

What You Need To Do

Use the 2019 statement on the reverse, with the Internal Revenue Service (IRS) Notice 03 below, to see if any of your Social Security benefits are

Box 2—"Social Security Number"—shows the Social Security number of the person shown in Box 1, if we have the number.

Box 3—"Benefits Paid in 2019"

Box 4—"Benefits Repaid to SSA in 2019"—shows the total amount of benefits you repaid us in 2019. We show items that apply to you in the column headed "Description of Amount in Box 4."

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2019

• PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
• SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name ROBERT L WALTERS		Box 2. Beneficiary's Social Security Number [REDACTED]-8632
Box 3. Benefits Paid in 2019 \$15,090.00	Box 4. Benefits Repaid to SSA in 2019 NONE	Box 5. Net Benefits for 2019 (Box 3 minus Box 4) \$15,090.00
DESCRIPTION OF AMOUNT IN BOX 3 Paid by check or direct deposit \$13,464.00 Medicare Part B premiums deducted from your benefits \$1,626.00 Total Additions \$15,090.00 Benefits for 2019 \$15,090.00		DESCRIPTION OF AMOUNT IN BOX 4 NONE
		Box 6. Voluntary Federal Income Tax Withheld NONE
		Box 7. Address ROBERT L WALTERS 429 BRANCHTON ROAD SLIPPERY ROCK PA 16057-3211
		Box 8. Claim Number (Use this number if you need to contact SSA.) [REDACTED]